

THEATER BOUND

Motivating Moviegoers to
Drive More Attendance

MOVIEGOING TRENDS & INSIGHTS STUDY
SPRING 2025



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DRIVING MORE MOVIEGOERS TO THEATERS IN 2025

2024 was a dynamic year at the domestic box office, with blockbuster movies like *Deadpool & Wolverine*, *Inside Out 2*, *Wicked*, *Dune: Part Two*, *Beetlejuice Beetlejuice*, *Twisters* and *Moana 2* drawing audiences to theaters and creating unforgettable moments. These films, along with the increased enthusiasm for new and alternative in-theater events like the Paris Summer Olympics Opening Ceremony in IMAX and AMC Theatres' Watch Parties, *Usher: Rendezvous in Paris* concert film, as well as sing-along screenings of *Wicked*, helped fuel a strong domestic box office that surpassed \$8.5 billion in revenue.

At Fandango, we remain committed to working with our partners and the exhibition community to continue delivering unparalleled experiences that keep moviegoers returning to theaters. In December 2024, we conducted our annual **Moviegoing Trends & Insights Study**, surveying over **5,000 moviegoers** to better understand their sentiments and behaviors, focusing on **Loyal Moviegoers** (those who saw five or more movies in theaters over the past year) and **Casual Moviegoers** (those who saw four or fewer movies in theaters) with the following objectives:

- Capture current moviegoing behaviors and sentiments
- Gain key insights from Loyal and Casual Moviegoers
- Identify opportunities to drive further theater attendance
- Reveal which summer movies fans are most excited to experience on the big screen in 2025

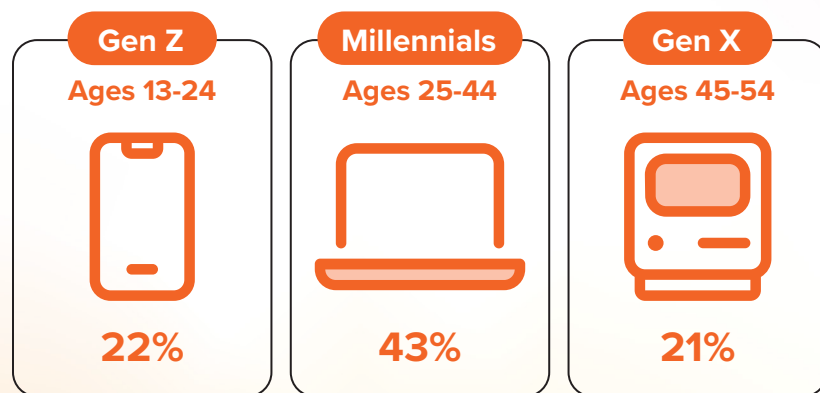
In this study, we will share what drives audiences to theaters — from how they discover new movies and what factors influence their decision to go to the movies, to their preferred in-theater experiences. Whether tailoring content offerings, enhancing convenience, or fine-tuning loyalty programs, this study will also identify opportunities to inspire more moviegoers to choose theaters as their entertainment destination. We hope that you find our insights useful!



A SNAPSHOT OF TODAY'S MOVIEGOERS

To understand moviegoers' behaviors and sentiments, we surveyed 5,000 moviegoers who saw at least one movie in theaters in 2024. Of those surveyed, 80% were between the ages of 18 and 54, with Millennials (ages 25-44) making up 43% of the population. These age groups provide valuable insight into what shapes the modern moviegoer.

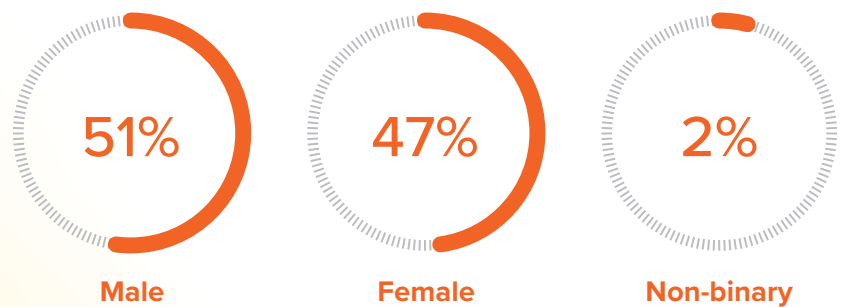
AGE BREAKDOWN



*The additional 14% are for those ages 55 and above

Looking at the gender breakdown within our sample, 51% identified as male, 47% as female, and 2% as non-binary. Another notable finding was the record-high percentage of parents among those surveyed at 63%, up from 37% last year.

GENDER BREAKDOWN



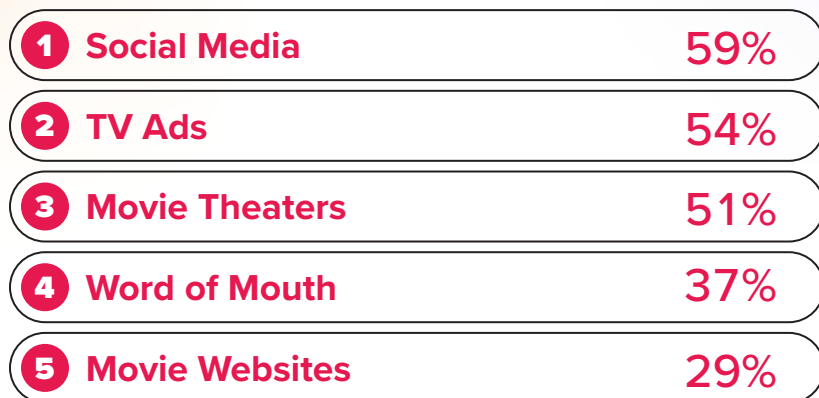
PARENTAL STATUS



DISCOVERING THE NEXT MUST-SEE MOVIE

With the increase of social media and new avenues for entertainment discovery, understanding how audiences discover films is key to driving attendance. **59% of moviegoers surveyed said they rely on social media** as their primary source for learning about movies playing in theaters, with **television advertising following closely at 54%**. With social media being the main discovery source, YouTube, Facebook, and Instagram dominate as the go-to destinations for theatrical movie discovery, while TikTok is the most impactful platform among Gen Z audiences.

TOP SOURCES FOR DISCOVERY



TOP SOCIAL MEDIA PLATFORMS



#1 for Gen Z

Video content remains the most effective format for sparking excitement about movies with **trailers, clips, and reviews** cited as the content that gets moviegoers thrilled to head to the theater. In fact, **Gen Z Moviegoers gravitate toward user-generated content** like TikTok debriefs and memes, making these formats critical for reaching younger audiences.

TOP CONTENT TO BUILD EXCITEMENT



MOVIEGOING: THE ULTIMATE ESCAPE

The theatrical experience has always offered moviegoers the ability to escape – transporting audiences into stories that entertain, inspire, and move them. **44% of moviegoers surveyed said they attend theaters to escape their daily routine**, while **Gen Z audiences cite the social gathering aspect of moviegoing**, specifically sharing the experience with friends, as their primary reason for heading to theaters. This is a shift from 2024, where “**love of the big screen and surround sound**” were cited as the top draws for moviegoing attendance.

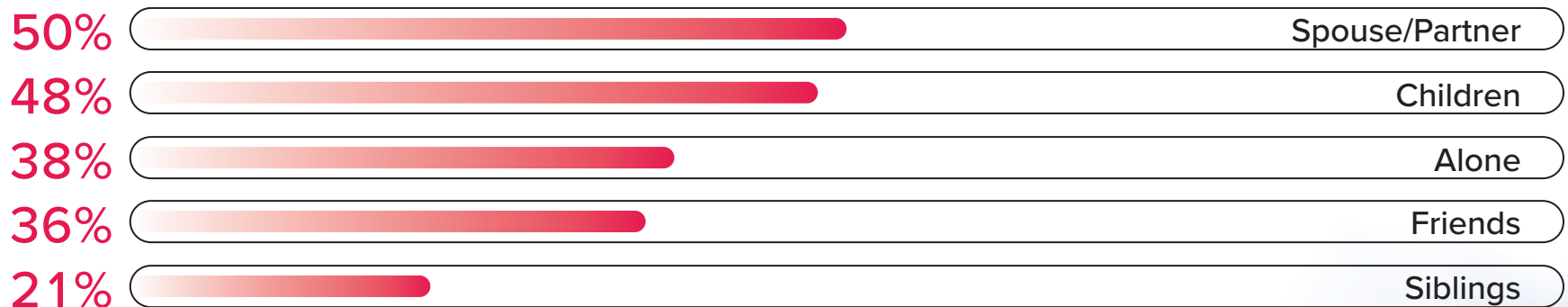
TOP 5 REASONS FOR GOING TO THE MOVIES

- 1 **Escape from daily routine**
- 2 **Form of relaxation**
- 3 **Big screen and surround sound**
- 4 **Social gathering** #1 for Gen Z
- 5 **Better picture and sound quality**

MOVIEGOING IS A SHARED EXPERIENCE

Going to the theater is not just an escape, it’s about sharing moments with others, with **50% of those surveyed saying they attend movies with a spouse/partner and 48% saying they attend with children**. Gen Z Moviegoers, however, are more likely to attend with friends, reinforcing their emphasis on the social elements the theater provides.

WHO MOVIEGOERS ESCAPE TO THEATERS WITH



HIGH SATISFACTION WITH ROOM TO IMPROVE

With an impressive slate of blockbuster films and alternative content for moviegoers – overall, moviegoing satisfaction remained high over the past year, with **95% of moviegoers enjoying their theatrical experience**, a slight decrease from 97% in the prior year. This high level of satisfaction is attributed to the quality of movies, comfortable seating, and the immersive experience that moviegoing provides. Additionally, **70% of respondents mentioned that the moviegoing experience cannot be recreated at home**, unfortunately down from 80% last year.

It's a special way to create lasting memories with my family. Seeing the kids so excited, laughing at the funny moments, or being completely immersed in the story makes it all worthwhile. The comfortable seating, great sound, and overall atmosphere really added to the experience. It's something we all look forward to and enjoy together.

- Surveyed Moviegoer

”

While moviegoing satisfaction remains strong overall, there are obstacles to overcome with **36% of moviegoers citing that finding deals on tickets** as a significant challenge, and **35% pointed to coordinating schedules as their main obstacle** – the latter being the number one challenge amongst Gen Z.

TOP MOVIEGOING CHALLENGES

- 1 Finding deals on movie tickets
- 2 Coordinating schedules #1 for Gen Z
- 3 Setting aside time to go to the movies
- 4 Figuring out how to fit in budget
- 5 Finding the right theater to see movies

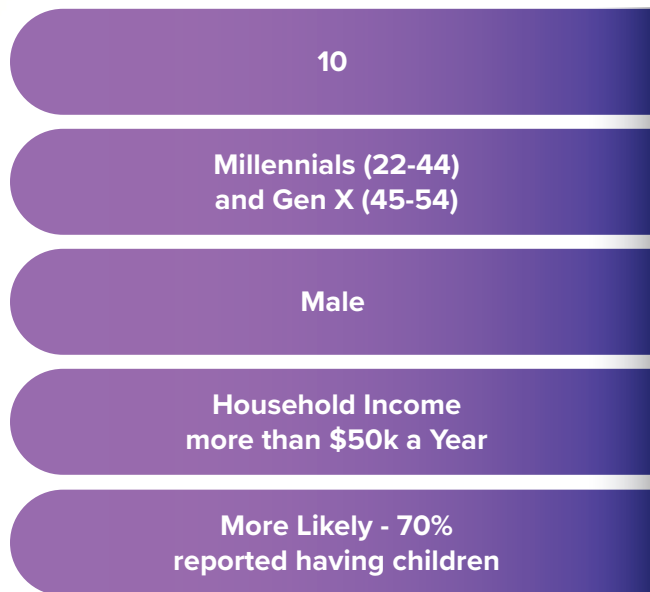
With these challenges in mind, it's important to explore solutions that could make moviegoing more accessible and convenient for all audiences to help maintain and grow engagement with the theatrical experience.

LOYAL VS. CASUAL MOVIEGOERS

To better understand what motivates moviegoers and how to continue to engage them, we took a closer look at **Loyal** and **Casual Moviegoers** and the differences in sentiment, behaviors and motivations. **Loyal Moviegoers made up 41% of the survey sample and saw five or more movies in theaters** over the last year, whereas **Casual Moviegoers** accounted for 59% of the survey sample and **attended four or fewer movies in theaters**. By examining these two groups, we can uncover valuable insights into retaining and motivating **Loyal Moviegoers**, while also identifying key opportunities to drive **Casual Moviegoers** to theaters more often.

Let's dive into who **Loyal** and **Casual Moviegoers** are.

LOYAL MOVIEGOERS



**AVERAGE MOVIES
WATCHED IN 2024**

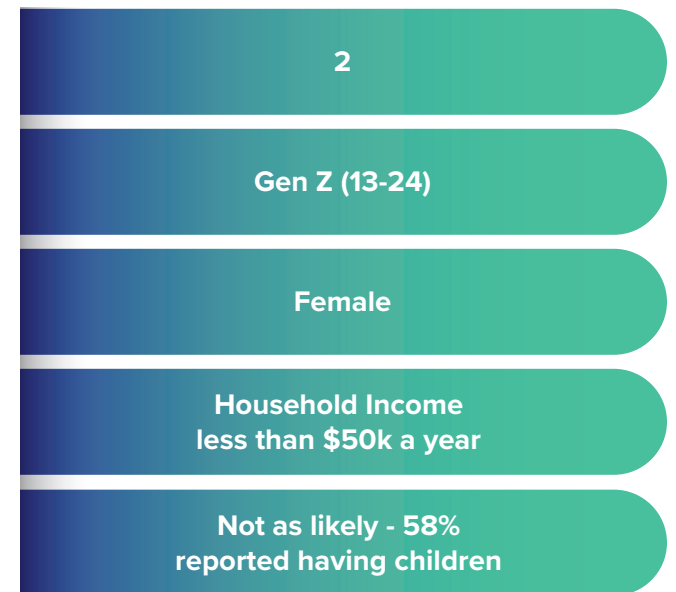
LIKELY AGE

LIKELY GENDER

LIKELY INCOME

**LIKELY TO
BE A PARENT**

CASUAL MOVIEGOERS



THE MOVIEGOING EXPERIENCE

This image illustrates key elements of the moviegoing experience for both Loyal and Casual Moviegoers from Discovery to Loyalty Programs.

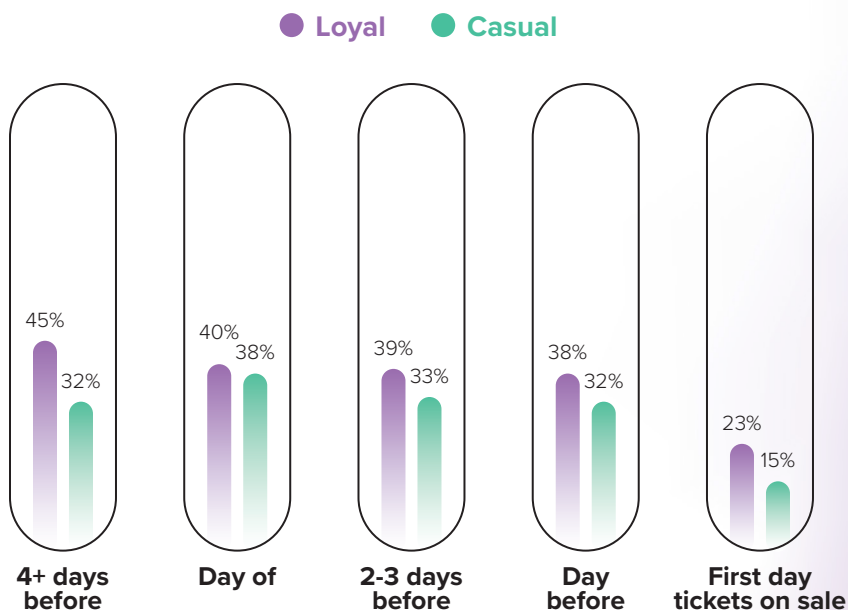


PLANNING: WHEN MOVIEGOERS DECIDE TO GO

Deciding when to go to the movies starts with awareness of when a title is coming to theaters, followed by making a plan. Our study revealed a clear distinction in how **Loyal** and **Casual Moviegoers** approach their decision-making when it comes to planning ahead. Awareness of when tickets first go on sale is higher among **Loyal Moviegoers at 74%, compared to just 54% of Casual Moviegoers.**

The difference in awareness also extends to ticket purchasing behavior, with **45% of Loyal Moviegoers citing they are more likely to purchase their movie tickets 4+ days in advance** compared to **38% of Casual Moviegoers, who most often purchase their tickets on the same day**, indicating a more spontaneous and less planned approach to moviegoing.

HOW FAR IN ADVANCE MOVIEGOERS PURCHASE TICKETS



With **Loyal Moviegoers** more inclined to plan ahead, it is no surprise that they show a higher interest in Early Access Screenings, with **46% of Loyal Moviegoers** being more likely to attend an early access screening, compared to only **28% of Casual Moviegoers.** Both groups cited social media, theater sites or apps, and ticketing sites or apps as the three sources for early access awareness.

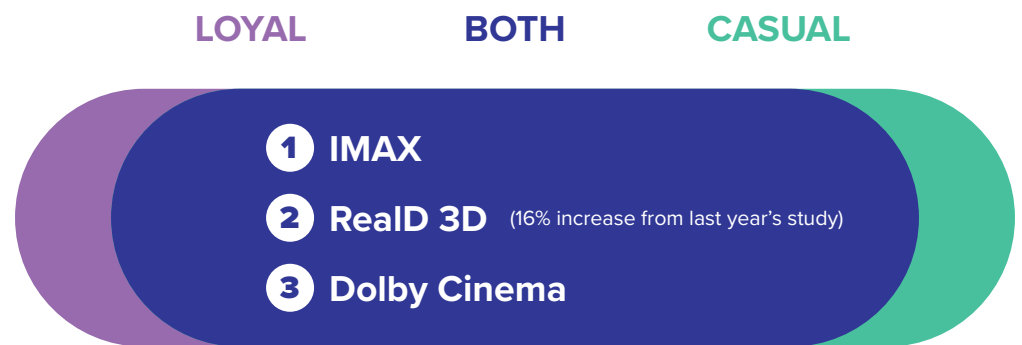
LIKELIHOOD OF ATTENDING AN EARLY ACCESS SCREENING



PREMIUM FORMATS: ELEVATING THE MOVIEGOING EXPERIENCE

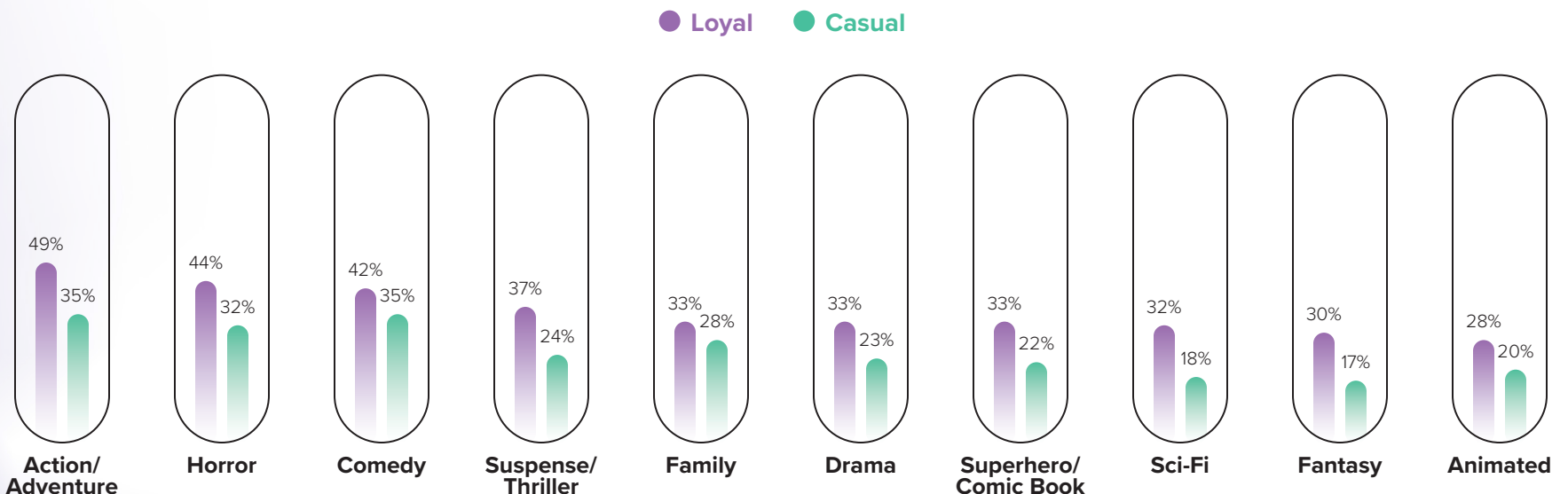
Experiencing the magic of the big screen in premium formats continues to rise in popularity, with **77% of all moviegoers reporting they watched at least one movie in a premium format this past year, up 6% from last year's study.** Loyal Moviegoers are big drivers of premium-format moviegoing with **88% seeing a premium-format movie in theaters** in the past year compared to **69% of Casual Moviegoers.**

TOP 3 TYPES OF PREMIUM FORMATS FOR BOTH LOYAL AND CASUAL MOVIEGOERS



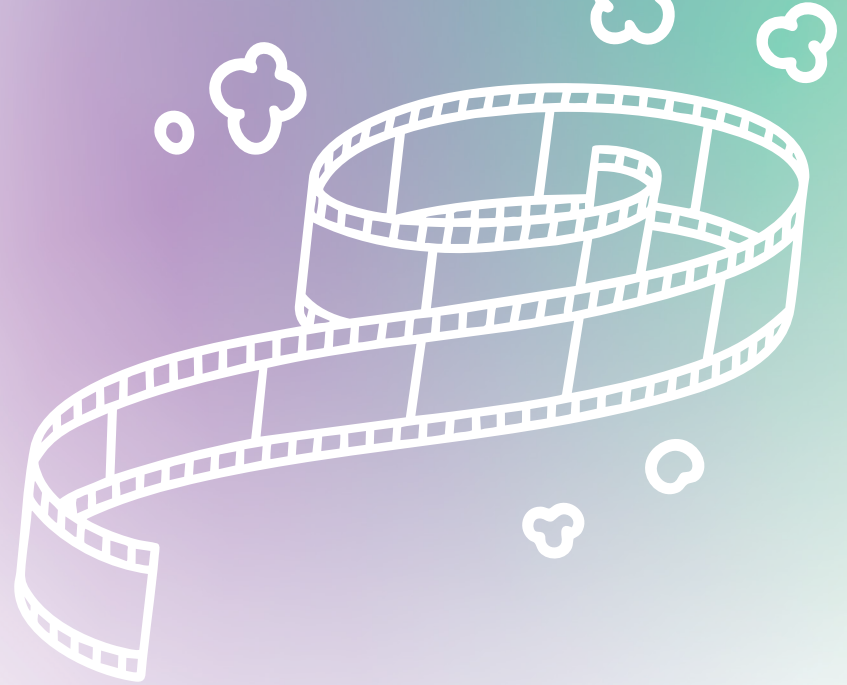
As premium formats continue to captivate moviegoers, **IMAX, RealD 3D, and Dolby Cinema emerged as the three most popular formats for both groups - with RealD 3D seeing a 16% increase from last year.** As both groups enjoy these premium experiences, they enjoy watching a variety of genres, with **action/adventure, horror, and comedy movies** topping the list.

WHAT KIND OF MOVIES ARE SEEN IN PREMIUM FORMATS



THE EASE OF ONLINE TICKETING

As the industry continues to evolve, purchasing tickets has become more convenient for moviegoers, with **55% of all moviegoers surveyed opting to buy their movie tickets online or through an app in the past year - a 13% increase from the previous year.** The shift toward digital ticketing is prominent among **Loyal Moviegoers**, with **65% preferring to buy tickets online**, compared to just **49% of Casual Moviegoers.**



BUYING TICKETS ONLINE

LOYAL

CASUAL

65%

49%

Both groups, however, agree on the key benefits of purchasing tickets online which include **skipping the lines at the box office, reserving seats, and securing showtimes.** These features help enhance convenience and ensure a smoother moviegoing experience for all moviegoers, contributing to the growing popularity of online ticketing.

REASONS FOR BUYING TICKETS ONLINE

BOTH LOYAL & CASUAL

1 Skip lines at the box office

2 Reserve seats

3 Secure showtimes

4 Book anywhere and anytime

5 Compare ticket prices



CONCESSIONS CONTINUE TO ENHANCE THE MOVIEGOING EXPERIENCE

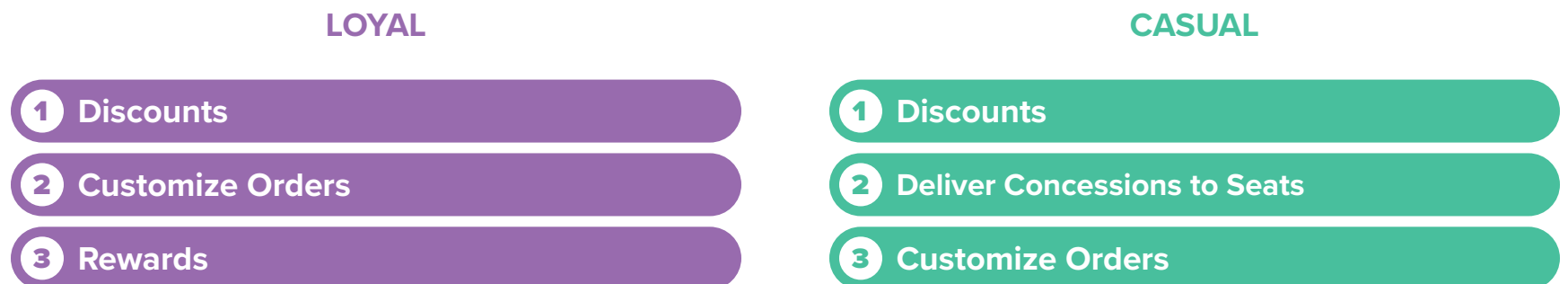
It is no surprise that both **Loyal and Casual Moviegoers** agree the moviegoing experience is not the same without concessions with **96% of all respondents saying they bought concessions during their movie trip this past year**, consistent with our 2024 study. Awareness for pre-ordering concessions is high among **Loyal (85%)** and **Casual Moviegoers (72%)**; however only **42% of Loyal Moviegoers and 22% of Casual Moviegoers actually pre-ordered concessions in the past year**, signaling a real growth opportunity among both groups.

PRE-ORDERING CONCESSIONS



The **top motivators among Loyal and Casual Moviegoers for pre-ordering concessions online or through an app are discounts and the ability to customize orders**. However, **Loyal Moviegoers** are more interested in earning rewards for online orders, while **Casual Moviegoers** prioritize seat delivery options.

PRE-ORDER CONCESSION DRIVERS



UNLOCKING THE POWER OF LOYALTY PROGRAMS

Loyalty programs remain a powerful tool for enticing moviegoers to return to theaters while also improving customer satisfaction. **More than 90% of Loyal Moviegoers are members of a free movie-related loyalty program, and Casual Moviegoers aren't far behind with nearly 80% being members.** Both groups stated that rewards and exclusive discounts on tickets and concessions are the most important benefits they seek in a free movie-related loyalty program regardless of their frequency.

MOST IMPORTANT BENEFITS OF A FREE PROGRAM

BOTH LOYAL & CASUAL



Paid loyalty programs are also growing in popularity, though they tend to appeal more to Loyal Moviegoers than Casual. **Nearly 50% of Loyal Moviegoers subscribe to a paid movie subscription service, whereas nearly 30% of Casual Moviegoers reported membership to a paid loyalty program.** Among both groups, the top three most sought-after benefits in a paid movie subscription include **waived fees, early access to tickets on sale, and bundles.** Loyal Moviegoers tend to value free upgrades to premium formats, whereas **Casual Moviegoers** are more interested in gifting discounted subscriptions to family and friends—an area that could potentially encourage more Casual Moviegoers to join paid loyalty programs.

MOST IMPORTANT BENEFITS OF A PAID PROGRAM

LOYAL

Waived fees on online tickets

CASUAL

Early access to tickets

MOVIEGOER PROFILES: A REFLECTION ON LOYAL VS. CASUAL

Through our findings, we've uncovered distinct profiles for both **Loyal and Casual Moviegoers**. **Loyal Moviegoers** tend to plan ahead, purchase tickets online and seek out premium formats while also actively participating in loyalty programs; whereas, **Casual Moviegoers** are more likely to attend movies seasonally or during special occasions, while also viewing the theater as a singular destination for entertainment and purchasing concessions. By understanding these profiles, we can better identify key opportunities to continue engaging **Loyal Moviegoers** while enticing more **Casual Moviegoers** to choose theaters for their movie viewing experience.

PROFILES

LOYAL

64% like to plan their trip to the movies in advance

73% make sure to grab food, drinks, or snacks

67% want to see movies in the highest quality

36% go to the movies year-round

65% make sure to earn loyalty points

62% like to do something else like eat out, gets drinks, etc.

65% frequently buy online

PLANNING

CONCESSIONS

PREMIUM FORMAT

SEASONALITY

LOYALTY

SURROUNDING ACTIVITIES

ONLINE TICKET

CASUAL

42% said going to the movies can be a last-minute decision

74% make sure to grab food, drinks, or snacks

46% don't care about format

54% go to the movies most often in the summer

51% don't really care about loyalty points

43% don't do anything else when going to the movies

51% mainly buy at the box office

DRIVING REPEAT VISITS TO THE BIG SCREEN

Now that we've explored the **Loyal and Casual Moviegoer** profiles, we can dive into understanding what will motivate them to continue coming to the theater in 2025. Our study reveals that **discount days are the top motivator for both groups and help drive repeat visits to theaters. Additionally, bundles on tickets and concessions, as well as group packages for family and friends**, are likely to encourage more trips to the theater for all moviegoers.

TOP MOTIVATORS

-  **Discount days**
-  **Bundles on tickets and concessions**
-  **Group packages**
-  **Weekly or monthly ticket bundles**
-  **Bundles with local restaurants**
-  **Bundles to see franchise movies**
-  **Same day ticket bundles**
-  **Exclusive content**
-  **Seasonal promotions**
-  **Early access screenings**

Both groups also expressed interest in more movie-themed holidays. In fact, **89% of all moviegoers surveyed said they attended the Cinema Foundation's National Cinema Day** on September 20th, 2024, and **88% participated in National Popcorn Day** on January 19th, 2024. Moviegoers highlighted that these themed holidays not only offer savings but also encourage them to explore films they might not typically consider.

To continue this effort, The National Association of Theatre Owners (NATO) launched “@ the Movies” campaign in December 2024. The initiative kicked off with National Popcorn Day in January, in partnership with Fandango, and continues throughout the year with events like “Sneak Peek Saturday,” “Date Night @ the Movies,” and “Family Day @ the Movies,” all in an effort to engage a broad range of moviegoers.

ATTENDANCE FOR MOVIE-THEMED HOLIDAYS

89%

NATIONAL CINEMA DAY

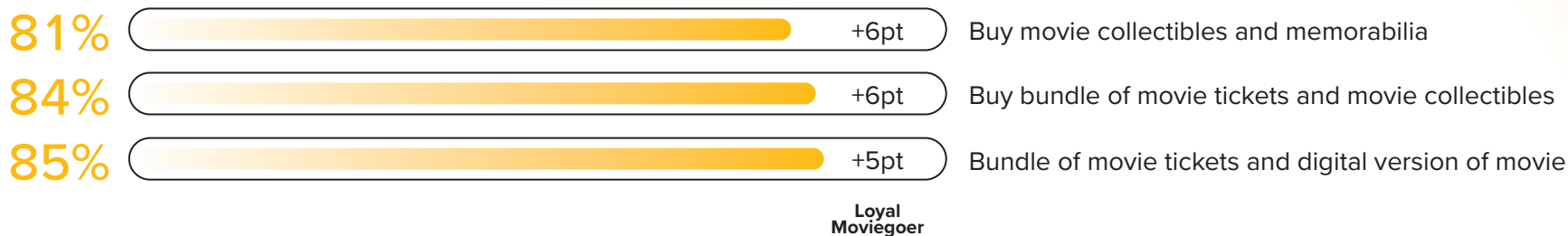
88%

NATIONAL POPCORN DAY

DEMAND FOR MOVIE MERCHANDISE & BUNDLES

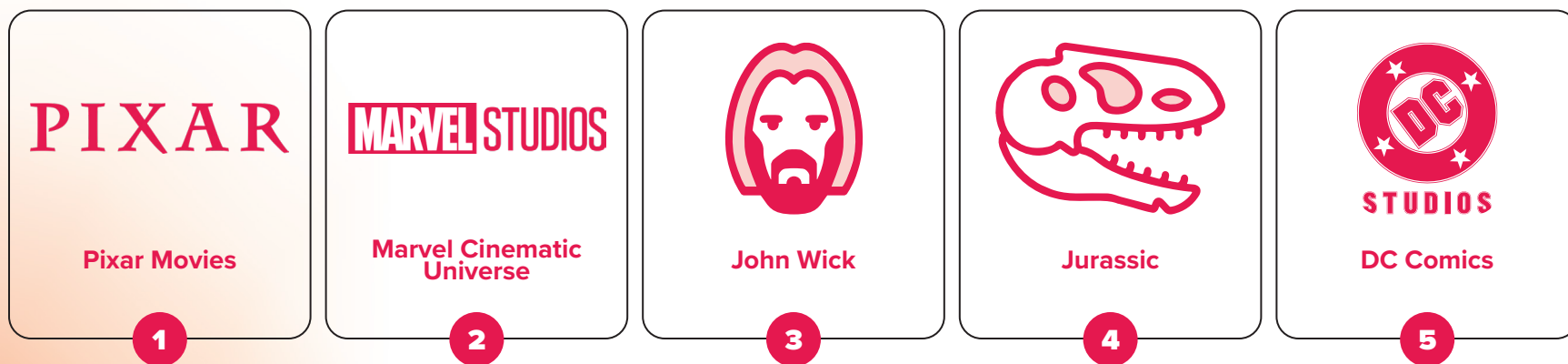
In addition to ticket and concessions bundles, there is a strong interest in bundles featuring movie-related merchandise, especially among **Loyal Moviegoers**, with **87% saying they would be interested in purchasing tickets bundled with movie collectibles** or a digital version of the movie to watch at home.

INTEREST IN MOVIE BUNDLES



The main motivator for merchandise bundles is that they offer an affordable option compared to purchasing tickets and merchandise separately. Personalization and loyalty points also serve as key incentives to drive interest in these bundles. Popular franchises such as Pixar, Marvel Cinematic Universe, and John Wick are mentioned as some of the franchises moviegoers are most interested in purchasing bundles for, with movie-themed drink containers and popcorn buckets topping the list of the collectibles moviegoers would love to receive in theaters.

TOP FRANCHISES FOR MERCHANDISE



THE RISE OF ALTERNATIVE CONTENT IN THEATERS

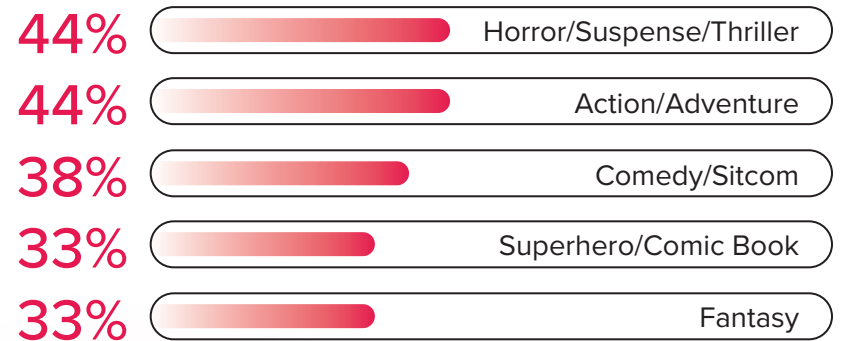
Exhibitors continue to diversify their alternative content offerings to meet audience demand and drive more attendance. While this is still a relatively new concept for many moviegoers, **over a quarter of the moviegoers surveyed have seen concert films in theaters, increasing to more than a third among Loyal Moviegoers.** Watching live sporting events in theaters remains the most appealing alternative content, with **80% percent of all moviegoers expressing interest in seeing sporting events in theaters, rising to 86% among Loyal Moviegoers.**

TOP SPORTING EVENTS TO SEE IN THEATERS

- 1 Super Bowl
- 2 NBA
- 3 NFL Regular Season/Playoffs
- 4 WWE
- 5 UFC

Beyond live sports, **TV premieres and finales** have also captured moviegoers' attention, with **75% of all surveyed moviegoers saying they would be interested in seeing these events in theaters** - increasing to over **80% among Loyal Moviegoers.** The top TV programming genres that would draw moviegoers to the big screen include horror/suspense/thriller, action/adventure, and comedy/sitcoms.

TOP TV PROGRAMMING

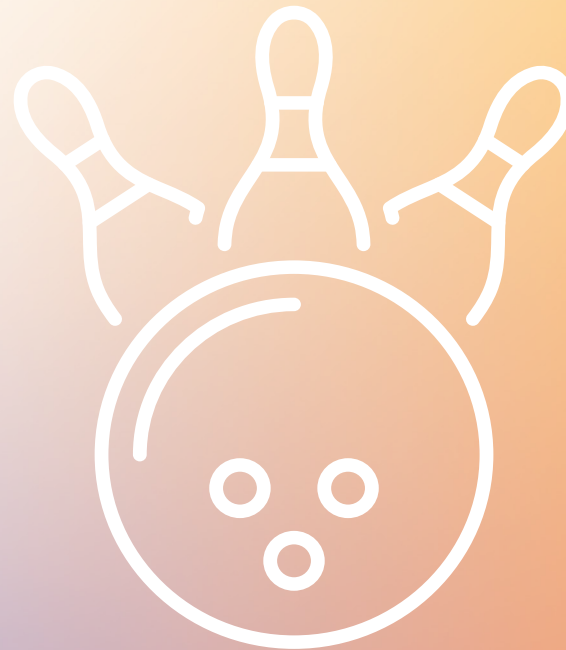


BEYOND THE SCREEN

In addition to alternative content, moviegoers are increasingly drawn to the idea of participating in other activities when they visit a theater - **41% of all moviegoers stated that arcades would be their top alternative activity they'd like to see in theaters**, followed by coffee or tea shops, and bars or lounges. Offering these alternatives presents an opportunity for exhibitors to expand the moviegoing experience, encouraging moviegoers to arrive early or stay later, and enhancing their overall theatrical experience.

TOP 10 AMENITIES MOVIEGOERS WANT IN THEATERS

- 1 Arcades
- 2 Coffee or Tea Shops
- 3 Bars and Lounges
- 4 Movie Exhibits
- 5 Photobooths
- 6 Bowling Alley
- 7 Merchandise Shops
- 8 Virtual Reality Zones
- 9 Laser Tag
- 10 Playgrounds



THE ROAD AHEAD: EXCITEMENT FOR 2025

2025 promises to be an exciting year for moviegoers, with **88% of all moviegoers surveyed planning to see more movies in theaters in 2025 compared to 2024, rising to 90% among the older Gen X audience.** Moviegoers are looking forward to heading to theaters more often, due to expectations for more film releases this year, particularly blockbusters and mega franchises. Additionally, technological advancements and special events add to the excitement, driving enthusiasm for what is sure to be a year full of memorable cinematic experiences.

TOP REASONS FOR SEEING MORE MOVIES IN 2025 FOR BOTH LOYAL AND CASUAL MOVIEGOERS

LOYAL

BOTH

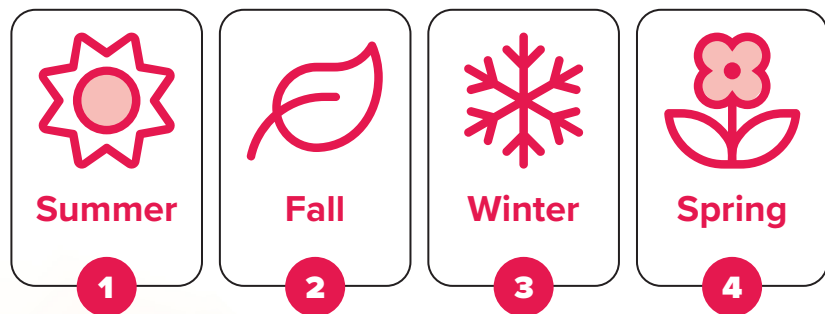
CASUAL

- 1 More movies are being released
- 2 More technological advances
- 3 More blockbusters and franchises
- 4 More special events
- 5 Upgraded theater amenities

FAVORITE TIME OF YEAR FOR MOVIEGOING

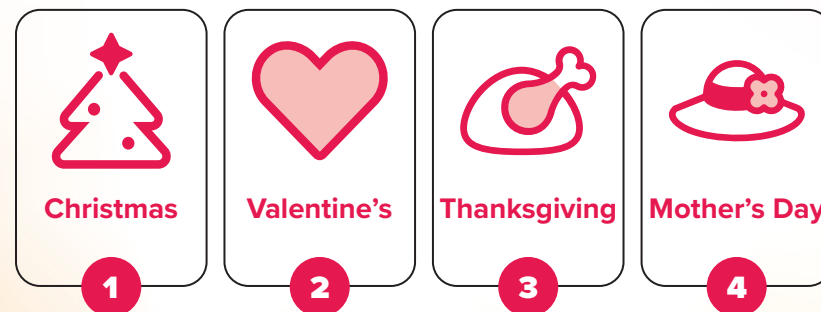
Watching movies undoubtedly topped the list of activities moviegoers love to do during their free time, followed by watching TV shows and dining out. However, seasonality plays a significant role in moviegoing habits. **66% of all moviegoers surveyed prefer to go to the movies seasonally instead of year-round**, with **Summer being the peak season for both Loyal and Casual Moviegoers**, though it is slightly more popular among Casual Moviegoers.

TOP MOVIEGOING SEASONS



When it comes to holidays, **Christmas Day is the most popular time to visit the theater with 33% of all moviegoers choosing it as their preferred holiday** to watch movies. This percentage increases to **38% among Loyal Moviegoers who have made it a tradition**. Following Christmas Day, Valentine's Day and Thanksgiving are the next major holidays that drive moviegoers to the theater.

TOP MOVIEGOING HOLIDAYS

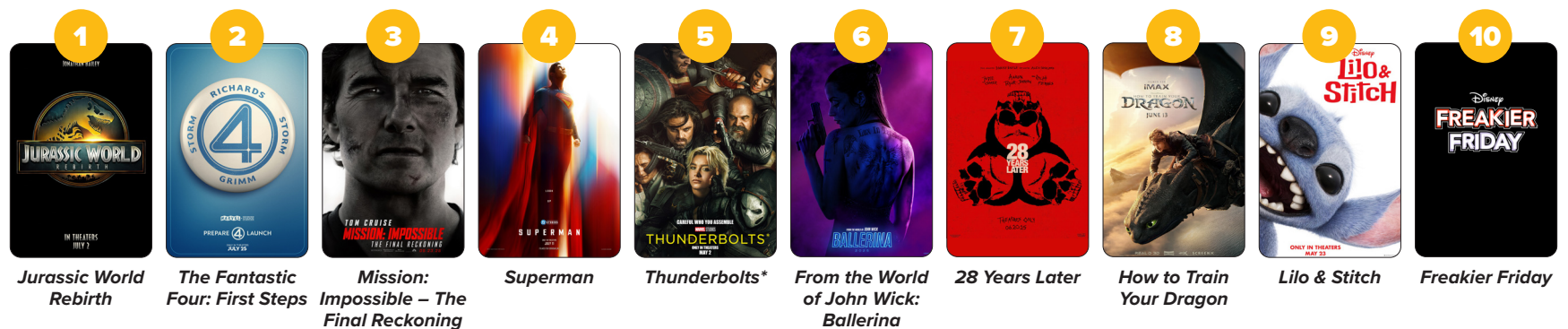


THE POWER OF SUMMER

Summer remains the favorite season for moviegoing, with **66% of all moviegoers planning to see four or more movies in theaters** this upcoming summer alone – rising to **69% among Gen Z**.

With an exciting slate of releases, the summer promises a diverse range of films for moviegoers to enjoy, such as *Jurassic World: Rebirth*, *The Fantastic Four: First Steps*, *Mission: Impossible - The Final Reckoning*, and *Superman* to name a few. Below are the top 10 most anticipated summer movies of 2025.

THE TOP 10 MOST ANTICIPATED SUMMER MOVIES



The reasons for summer’s popularity as the prime moviegoing season is clear, with **83% of all moviegoers planning to beat the summer heat by heading to the theater**. Additionally, **78% are interested in seeing a variety of movie genres in theaters over the summer** - up from 68% in the previous year, showing a growing interest in moviegoers actively wanting to diversify their cinematic experiences.

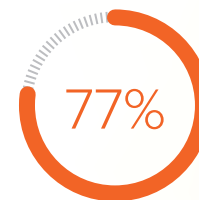
TOP 3 REASONS FOR GOING TO THE MOVIES THIS SUMMER



Going to the movies is a fun way to beat the summer heat



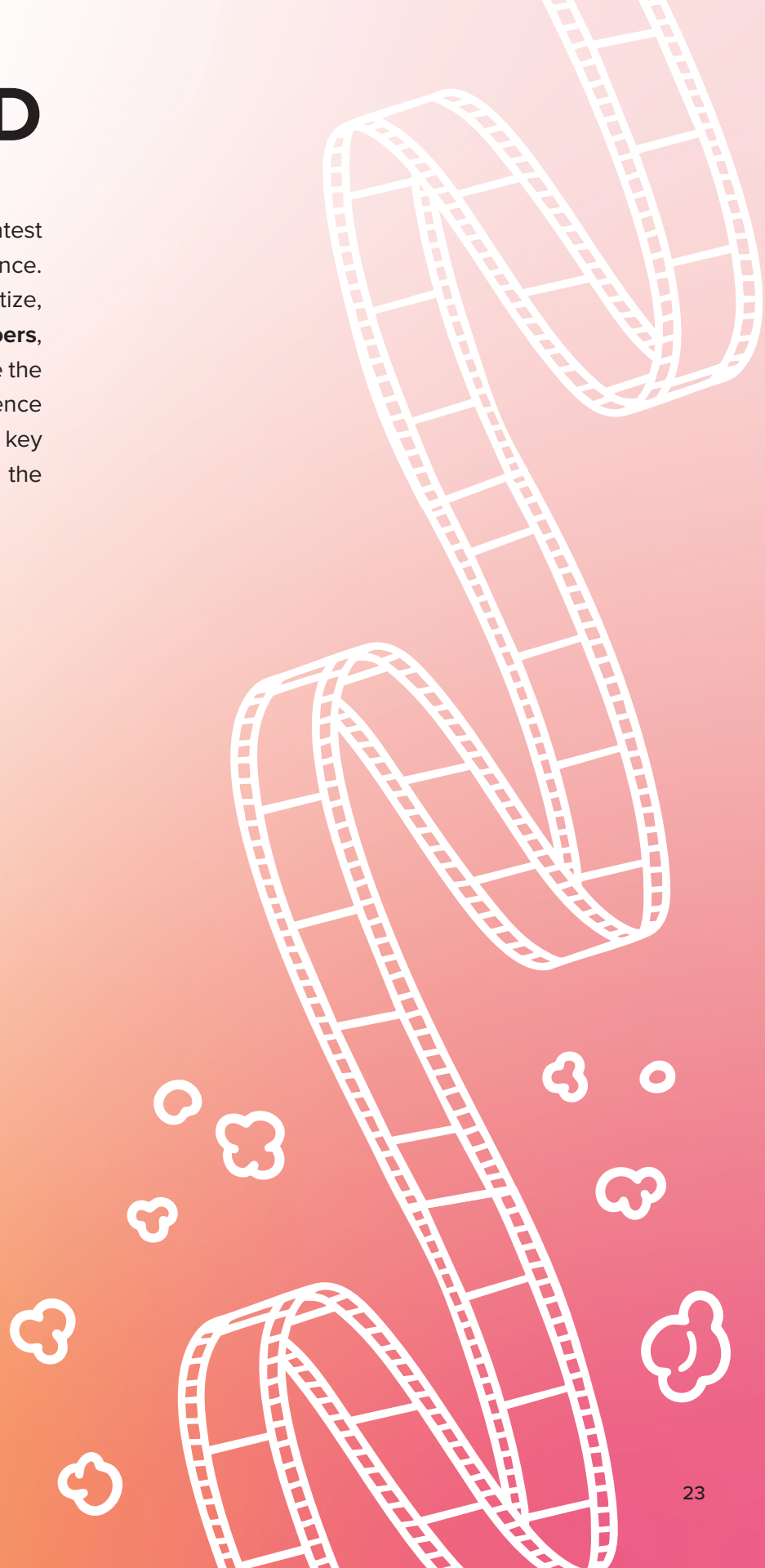
I am interested in seeing various types of movies in theaters over the summer



I like to spend time with family and/or friends at the movies during the summer

LOOKING FORWARD

At Fandango, we take pride in providing the industry with the latest moviegoing trends and insights to help increase theater attendance. Our study provides valuable insights into what moviegoers prioritize, diving deep into the preferences of both **Loyal and Casual Moviegoers**, identifying key areas to engage and encourage both groups to make the theater their destination of choice. We cherish the theatrical experience and look forward to collaborating with our partners to turn these key findings into action, ultimately motivating consumers to embrace the theater as their #1 choice for entertainment.



OUR METHODOLOGY AND CONTACT INFORMATION

Below are some of the details on who we spoke with and our research methodology. Please reach out to your Fandango Contacts for more information. **Let's continue motivating moviegoers to keep coming back to the big screen!**

This study was conducted in December of 2024, surveying more than 5,000 moviegoers, all who purchased at least one ticket to a theater since January 2024. The demographic breakdown of the surveyed moviegoers was 80% ages 18 to 54, with 51% identifying as male, 47% female, and 2% non-binary. 45% described themselves as Caucasian; 42% Latinx/Hispanic; 18% Black/African American; 5% Asian/Pacific Islander; and 2% other. Some respondents identified with multiple ethnicities.

If you have questions, please feel free to reach out to the appropriate contacts below:

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